

How to Capture & Manage Litigation Case Details

Objective

- Capture & Manage Litigation Case details

Steps

After adding a case, it will be accessible from the grid in the Litigation Cases module.

You can access a case by clicking on its name or ID in the grid.

Litigation Cases												Export	Tools		
All			Save as										Search	Advanced	Columns
1 - 20 of 74 Items															
<input type="checkbox"/>	ID	Name	Practice Area	Stage	Assignee	Opponents	Workflow Status	Client Name	Important Development	Client Position	Value	Assigned To			
<input type="checkbox"/>	M00000333	مخبرتي التأمينية	Commercial	Appeal Court			1-Review	Maria Smith			0.00	All Teams			
<input type="checkbox"/>	M00000331	Advanced Insurance vs Adam Banking Case	Constitutional Court		Sam Marven		In Progress		[2023-11-28 11:30:11]: Case Reviewed		0.00	Litigation Tea			
<input type="checkbox"/>	M00000329	Albert Vs Branding Company	Civil	Execution (Ongoing)		Branding Company - Plaintiff	Open	Albert smith		Defendant	0.00	All Teams			
<input type="checkbox"/>	M00000325	Peter Insurance Company Vs Albert Insurance case	Insurance	Appeal Court		Peter Insurance Company - Plaintiff	In Progress	Albert Dave		Defendant	0.00	All Teams			
<input type="checkbox"/>	M00000323	ABC X Agency Grid	Commercial	First Instance Court (Judged)	Jimmy Peterson	Agency Grid - Plaintiff	In Progress	abc		Defendant	0.00	All Teams			
<input type="checkbox"/>	M00000317	Albert Dave VS Peter company	Insurance	Execution (Ongoing)	Carolina Robinson	Peter Finance - Defendant	In Progress	Albert Dave	[2023-10-31 13:13:16]: 123	Plaintiff	0.00	All Teams			
<input type="checkbox"/>	M00000315	BLP VS ABC Services	Real Estate	Appeal Court (Ongoing)	Carolina Robinson	ABC Services - Defendant	Drafting	BLP industry	[2023-10-30 11:26:22]: 123 [2023-10-30...	Plaintiff	0.00	All Teams			
<input type="checkbox"/>	M00000308	Green Tech Vs ReneCorp Echo tech solution	Intellectual Property	Primary Court (Ongoing)		Back Boss company - Petitioner, ReneCorp - Defendant	In Progress	Green Tech Inc	[2023-10-23 13:10:33]: Settlement Negotiations...	Plaintiff	0.00	All Teams			
<input type="checkbox"/>	M00000300	Michael VLP BLP company	Constitutional Court	Execution (Ongoing)	Sam Marven	BLP industry	In Progress	Michael Cavin	[2023-10-12 11:35:24]: 123		0.00	Litigation Tea			
<input type="checkbox"/>	M00000297	NBO v ABC	Commercial	Appeal Court	Sam Marven		In Progress	NBO	[2023-09-25 09:17:55]: here are the updates...		0.00	Litigation Tea			

In the panel on the left, there are sub-tabs to capture items related to this Case. Across the top of the page, you'll find the Matter ID and Name, the ability to change the status of the case, enable Email Notifications, Add a note, save, and perform a number of actions related to the Case.

M00000175 Paul Jones Vs Basil Crown Contracting Case

Matter - Litigation Case

CancelledClosedDonemoreSaveActions

General Info

Custom Fields

External Advisor

Related Contributors

Notes

History

Stages & Activities

Emails New

Bills

Attachments

Expenses

Time Entries

Matters

Contracts & Documents

Settings

Trust0.00 USD

Paid1,050.00 USD

Due0.00 USD

Billable1,050.00 USD

Cap10,000.00 USD

General Info

Name

Paul Jones Vs Basil Crown Contracting C

Practice Area

Construction, Contracting

Workflow Status

In Progress

Workflow used

System Workflow (default)

Internal Ref Number

2023/5698

Matter Container

Start typing

Matter Priority

Medium

Stage

None

Success Probability

None

Value (USD)

0

Judgment Value (USD)

0

Recovered Value(USD)

0

Client Name

Paul Jones

Client Position

Report Requester

Opponent (1)

Basil Crown

Opponent Position

None

+ Add another Opponent

Description

People

Assigned Team

All Teams

Assignee

Carolina Robinson

Referred By

Start typing

Requested By

Start typing

Privacy

Shared With

Set as Private

Everyone

Date & Times

Arrival Date

2023-03-01

Under this section, you have 5 widgets that reflect in general the financial information about this Case. If there was a Trust Fund balance, the amount paid by the Client, the amount Due to being paid, the Billable amount, and the Capping.

External Advisor

- **Related Contributors:** If there is anyone else working on this Case you can mention them here, select the contact name.
- **Notes:** Here you can keep a trail of all the noteworthy updates related to this Case.
- **History:** The Audit Report tab is to keep track of the changes made to the main fields of the Case, who made the changes, and when.

Along the right side of the page, you have sections for the People related to this Case, Privacy options, and the Dates and Times.

M00000175 Paul Jones Vs Basil Crown Contracting Case

Cancelled
Closed
Done
more ▾
 Notifications
 Save
 Actions

General Info

- Custom Fields
- External Advisor
- Related Contributors
- Notes
- History

Stages & Activities

- Emails New
- Bills
- Attachments
- Expenses
- Time Entries
- Matters

Contracts & Documents

- Settings

Trust 0.00 USD
 Paid 1,050.00 USD
 Due 0.00 USD
 Billable 1,050.00 USD
 Cap 10,000.00 USD

General Info

Name *	Paul Jones Vs Basil Crown Contracting Co			Practice Area *	Construction, Contracting
Workflow Status	In Progress	Workflow used	System Workflow (default)		
Internal Ref Number	2023/5698	Matter Container	Start typing		
Matter Priority	Medium	Stage	None		
Success Probability	None	Value (USD)	0		
Judgment Value (USD)	0	Recovered Value(USD)	0		
Client Name	Paul Jones	Client Position	Report Requester		
Opponent (1)	Basil Crown	Opponent Position	None		

+ Add another Opponent

Description ?

People

Assigned Team All Teams

Assignee Carolina Robinson

Referred By Start typing

Requested By Start typing

Privacy

Shared With Set as Private

Everyone

Date & Times

Arrival Date * 2023-03-01

You have also sections for related Persons and Companies - you can add them from Add New - search for them, and specify their role on this Case. Roles are a customizable list.

